DOCUMENT RESUME

ED 167 858 CG 013 253

TITLE Developing Your Volunteer Program in Aging: Training Design, Part 2.
INSTITUTION Michigan State Office of Services to the Aging, Lansing.
PUB DATE Jan 76
NOTE 91p.; For related documents, see CG 013 252-254 ; Parts may not reproduce clearly due to print quality

EDRS PRICE MF01/PC04 Plus Postage.
DESCRIPTORS *Older Adults; *Program Development; *Project Training Methods; *Sensitivity Training; Social Agencies; *Volunteers; *Volunteer Training

ABSTRACT

This manual, prepared by the Michigan Office of Services to the Aging, is intended to aid agencies concerned with aging in planning volunteer programs. This second of three volumes helps the volunteer coordinator design and implement a successful training program for the volunteer network. The training process described here begins with the identification of volunteer needs and problems. The manual shows how the trainer can set learning objectives which are discussed and agreed to by the volunteer. Other training exercises presented include using a variety of techniques to meet these objectives. The final step in the training process, evaluation, is presented as an ongoing concern of both the volunteer and the trainer. (BN)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

Developing Your Volunteer Program in Aging

ED167858

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

J Walker

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC) AND USERS OF THE ERIC SYSTEM."

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY

BEST COPY AVAILABLE

2 TRAINING DESIGN

ED 013252

DEVELOPING YOUR VOLUNTEER PROGRAM IN AGING

2

TRAINING DESIGN

Adapted from "Training Student Volunteers" (ACTION Training Manual 4000.1, 6/73), prepared by the National Student Volunteer Program, Washington, DC.

Michigan Office of Services to the Aging

Ronald E. Kivi, Director
3500 North Logan Avenue
Lansing, Michigan 48913

January, 1976

This publication was made possible through Title IV A funds awarded by the Administration on Aging, U. S. Department of Health, Education, and Welfare.

INTRODUCTION

This Manual has been prepared by the Michigan OFFICE OF SERVICES TO THE AGING to aid agencies concerned with aging in planning volunteer programs.

We have attempted to make the material applicable to most situations. It can be used to help staff: identify program responsibilities, plan effective management of volunteer programs, and train volunteers. Of course, each person involved with a volunteer program will develop his/her own approaches which will best suit his/her personality and that of the agency. The steps outlined in the booklets are merely suggestions.

The Manual is composed of three booklets. The first booklet (Volume 1) covers the essentials for volunteer program development: identifying and assessing your need for a program, writing job descriptions, and identifying the resources to help you implement your volunteer program. It describes recruiting, matching and placement, orientation, and other important procedures you might wish to use. In addition, this booklet deals with aspects of administration, such as funding and budgets.

The second booklet (Volume 2) has been prepared to aid the volunteer coordinator design and implement a successful training program for their volunteer network. It's primary focus is on developing the means to bring forth the skills and talents of volunteers to meet clearly specified objectives. The principles of this training program have been utilized and proved to be successful by the ACTION student volunteer program. Since it makes sense to build on past success, this booklet is an edited version of "Training Student Volunteers," published by the ACTION National Student Volunteer Program, Washington, D.C.

The third booklet (Volume 3) contains descriptions of and materials from a variety of volunteer programs around the country.

The first booklet, "Laying the Groundwork," is intended for the agency director and staff. The second booklet, "Training Design," is meant for the volunteer coordinator. The third booklet, "Resource Materials," is directed to be agency director and staff. All three volumes can be obtained from the Michigan OFFICE OF SERVICES TO THE AGING.

If you would like assistance in implementing your volunteer program or training sessions, please feel free to contact us.

It is our hope that through utilizing this material you will be able to realize the full value of volunteers in your community.

Ronald E. Kivi
Director
Michigan Office of
Services to the Aging

PHILOSOPHY STATEMENT

A volunteer program can be a tremendous asset to a community. It can provide necessary services that would be otherwise unavailable. It can reach people who are desperately in need of help, but who receive assistance from no other organization. It can provide a meaningful opportunity to the person who wants to contribute to another's welfare or to the welfare of his/her community.

In no way will the volunteer replace the professional staff of a program in aging. Rather, the volunteer can supplement and complement any staff effort. the Michigan OFFICE OF SERVICES TO THE AGING proposes that a volunteer, when given training and proper supervision and supported by a well-organized volunteer program, can bring about a wider range of services, and play a major role in meeting the needs of Michigan's aging citizenry.

BOOKLET SUMMARY - VOLUME 2

The training process begins with the identification of volunteer needs and problems. This first step enables the trainer to set learning objectives, which should be discussed with and agreed to by the volunteer. The trainer is then able to construct training sessions to meet these objectives, using a variety of educational techniques.

Evaluation is the final step in the training process, but should be considered an on-going responsibility of both the volunteer and the trainer.

TABLE OF CONTENTS

I. What is Training? 1

II. Who is a Trainer? 9

III. Need Assessment and Establishing Objectives 14

IV. When the Group Gets Together. 38

V. Techniques: How to Use Them. 59

Training Exercises

Climate Setting 67

Goal Agreement. 73

Learning Activities 81

VI. Evaluation. 91

ACKNOWLEDGEMENTS

Grateful acknowledgement is made to the National Student Volunteers program for the use of their training manual, upon which this volume is based.

Special appreciation is due to Beth Sheeks for the typing of the manuscript and to other Institute of Gerontology staff members for handling production details.

HOW TO USE THIS BOOKLET

Our first assumption is that you don't consider yourself an expert trainer. If you do, then you already know just about everything in this booklet. Our second assumption is that you want to become more skilled in training volunteers.

This booklet offers you a design scheme. It is a seven-step process, one that should enable you to plan, conduct, and evaluate training sessions in many settings for a variety of people.

1. Assess Needs
2. Establish General Learning Objectives
3. Establish Definitive Learning Objectives
4. Set a Climate for Learning
5. Agree on Goals for Learning
6. Conduct Training
7. Evaluate Accomplishments

By the time you finish the booklet you should be able to use the seven-step process with a reasonable degree of skill. Those of you who have never trained before will be able to design a simple two-to-eight-hour session. For those with prior training experience, there is virtually no limit. This manual does not, and cannot, help readers acquire skills in working with groups. A book cannot do that. Sure skills are learned by experience. This book *does* provide a design scheme appropriate for training groups of volunteers, providing them with the skills, knowledge, and attitudes necessary to perform competently. Your training will have clear objectives and will move towards a defined goal.

There are several sections in the booklet. Chapters 3 and 4 are interdependent and must be read together. Any of the others may be read independently, but together they make up a rational whole. You may want to read from beginning to end, but this is a booklet, not a novel. You may experience a sense of bogging down if you choose to read straight through. Don't worry about that. You can always come back later.

The first two chapters discuss training and trainers. Chapter three contains two important parts: "Assessing Training Needs" and "Establishing Objectives for Training." Without the information in this section, the others that follow will be confusing if not downright incomprehensible. This chapter is also a design chapter. It shows one how to complete a design once the needs have been established and objectives set. Chapter four is focused on the training event itself and covers climate setting, goal agreement, and conducting the session. A number of sample techniques are included in chapter five. They are designed to actively involve the learner in the learning process. They are general exercises that are useful for the initial phases of almost any training event. Thereafter, you're on your own. Most of you will want to invent your own learning exercises to fit your needs.

Here and there you'll discover self-testing devices and learning aids. They are included to assist you. We recommend their use, but they are not essential.

You may reproduce anything in this book. If you have occasion to use the narrative portions, we ask that you give credit to the source. Some of the exercises in the Techniques Chapter have been adapted from the J. William Pfeiffer and John E. Jones series, *A Handbook of Structured Experiences for Human Relations Training,* University Associates Press, P. O. Box 615, Iowa City, Iowa 52240.

We hope you enjoy this booklet and find it useful. Happy training!

I

WHAT IS TRAINING?

WHAT IS TRAINING?

"What is training?" This is very difficult to answer to everyone's satisfaction. Horse trainers and people trainers differ in both their views and methods. No one can say, "I do it right! Unless others do as I do, they don't train." No one has yet discovered the elusive, universal IT that is training.

A Definition

If you must have a definition, you can look in the dictionary, but precisely defining "train" and "training" is not very helpful for a trainer. *What counts is the action taken.*

One of the concepts "training" communicates is a sense of movement and process. Training, like the word "growing," suggests a process of change. Also, the word implies goals toward which the process moves.

People are trained to become proficient at doing something--something that can be measured. Training is not a random exercise. It is a rational, systematic process of planned change by which marginally proficient people become more proficient in accomplishing specific, previously established goals.

Schooling and Training

Before proceeding, we should draw a distinction between content-centered formal schooling and experience-based training.

"Experience is a dear school, but fools will learn in no other." This old proverb suggests that formal, organized schooling can substitute for experience. By means of schooling, persons are supposed to become competent without the pains of learning everything from personal experience. There is some sense to that. Who wants to reinvent the wheel? Would you want the interested beginner to learn medicine by experimenting on you? Unfortunately, as formal education became a part of our way of life, experience got pushed into a back seat. Life and living increasingly were regarded as inferior learning tools--incomplete, random, and unscientific.

Consider the emphasis currently placed upon educational credentials. Experience, as the proverb says, is for fools. The wise go to school.

However, the schooling model works only up to a point. By age 10, most people accumulate impressive funds of experience to draw upon for purposes of learning. This does not mean that formal education should stop at the fourth or fifth grade. However, it does mean that after about age 10, much more can be learned if the learner can also become involved in experiential learning.

In particular, adults prefer learning environments in which they can utilize their experiences to solve problems and continue to grow. The advantage of experience-based training is that experience is first generated by participants themselves and only then is it shared and analyzed by the group. The results of such learning are relevant to the learners' experience. If training works well, learners discover a whole new process of inquiry and growth.

As trainers, you should realize that adults possess a wealth of experience to offer as resources to others. Learners can become active co-partners in their own learning. They share, shape, guide and synthesize it. For many learners, this adult education is a new experience. They are accustomed to having teachers tell them what is important and what isn't. You can well imagine the elation of those who found they could learn in groups without being told what to learn by the teacher.

Adult Learning Characteristics

What are the characteristics of the adult learner that distinguish him and make adult education important? We've already mentioned a few. Now let's elaborate.

First is the *adult self-image*. Adults don't perceive themselves as dependent children. Quite the contrary. Adults see themselves as capable of maintaining control of their own lives and making rational decisions for themselves.

Second, *adults are experienced*. Everyone acquires an incredible amount of information in the first 18 years of life. Moreover, adults

define themselves in terms of their experiences. Their histories are exceedingly valuable to themselves and others. This experience is a prime resource for the trainer.

Characteristic number three: *Problems are more real to adults than ideas are.* Most adults can't afford to keep solutions at bay until they learn more principles. On-going demands and responsibilities thrust adults into the present and its problems rather than back to the past or even to a delayed future. Children are immersed in a delayed application educational pattern: "Someday you'll need it." Adults won't put up with this.

Both children and adults experience times when they're ready to learn. However, children learn when their bodies and minds are ready. Adults' "teachable moments" focus on role functions: home building, establishing a marriage and a family, choosing a vocation or interest. At his teachable moments, the adult is almost inevitably involved with others. Unlike a child, the adults' major educational receptivity is not so concerned with growing up as with taking responsible roles in the world.

Educational Implications

Each characteristic suggests educational implications. For example, since adults are involved with others, it is unwise to build educational curricula for them that lack participant input and planning. And since adults value their adult status, it is equally unwise to place adults in restricted environments (rigid seating, raise your hand if you know the answer, ask permission if you wish to leave the room).

The role of the teacher of adults is different. For children, the teacher is the chief resource. For adults, the teacher is only one of many resources. The teacher's job shifts from that of content person to that of learning facilitator. Adults require learning situations that conform to their histories rather than to abstract, ideal conditions. Finally, adults appreciate experiential, participatory learning; it is a way for them to introduce personal experience as a resource.

Since adults are concerned with solving problems, curricula should be practical and immediately applicable back home. "How to do it" is usually more significant than "why you should or should not do it." Take this manual for example. You don't need a collection of essays about training. You want something that helps you get cracking.

As far as readiness to learn is concerned, the trainer must be careful to select exercises, examples, and structures, not to mention content, with which the group can identify. This is a particularly crucial aspect in multi-racial and cross-cultural training. Don't try to pawn something like middle class values off on racially mixed groups.

The Theory in a Nutshell

To put it all together, adults don't behave like children, and cannot be expected to learn like children. They possess experience, insights, and skills that are unique and valuable learning resources. Because of their immediate responsibilities, adults are problem oriented and don't relish delayed learning outcomes. Finally, experienced-based learning is more congenial to adults because it permits them to share their own resources and recognize the learning experience as relevant. This probably seems incredibly simple to you. You're right. But the world being what it is, educational systems don't always conform to what anyone can plainly see. The reason is obvious. The power of the traditional schooling culture is great. Most of us have never known anything other than passive learning in schools. Now, we're asking ourselves to reverse that trend and become active learners. Obvious? Yes. Simple? No. As rational as the principles of adult education are, they are precisely opposite to the operative principles of formal schooling. In training volunteers for programs for the aging, you must both act and think differently than a teacher in a traditional classroom.

The following analogy may prove useful to illustrate the difference between formal schooling and training: In formal schooling systems, the teacher is to students as a virtuoso violinist is to an audience; the

audience is passive. In training, the trainer is to participants as a symphony conductor is to members of the orchestra. The trainer and the participants are all active.

Types of Training

Some types of experience-based training do not aim at any apparent results. Sensitivity and encounter training, for example, are educational smorgasbords. They are open-ended, and few definitive objectives are involved. The process common to training of this type is an exploration of an unpredictable dynamic involving the interaction of a particular mix of people. There is no way to predict with certainty the insights and skills trainees will get. Some people go through a T-Group and never learn a thing. Others learn an incredible amount--and these two learners can be sitting next to one another!

This manual is mainly concerned with another type of training--training which leads to measurable objectives. There is no question as to the outcome of typing training. Either a student can type X words per minute, or he can't. The specific objectives are clear and predictable. Moreover, all participants can be expected to possess roughly the same degree of skill at the end. This type of training is close-ended and objective-centered. Most training is.

For you, most of your work will be objective-focused. It will lead toward a measurable increase of competence and skill. Of course, volunteer programs do touch feelings, values and attitudes--areas open-ended training explores rather well, but that is not the principal area of concern of this manual. It has been designed to help you train volunteers in skill areas such as tutoring, counseling, organizing, and managing. Therefore, your designs will be structured. You'll need to know how to design around specific objectives. Very little aimless rapping will occur in your training events. The point is, there are various types of training, and it is best not to confuse them.

WHO IS A TRAINER?

What is a trainer? Or better still, *who* is a trainer? Obviously, a trainer is one who trains. Anyone can figure that out without too much trouble and be no better off for having done so. What one really needs is an examination of the skills, values, and backgrounds that qualify a person as a trainer.

Not a Teacher

A trainer is a facilitator of group learning for adults. The trainer's expertise rests upon his ability to design and manage a context in which participants and expert resource persons (including the trainer and selected others) can utilize their own needs, goals, and abilities for the purpose of learning. Trainers are process experts. A trainer is a conductor. It is a trainer's task to orchestrate so that the result is harmonious and of greater variety and magnitude than any one person could produce alone. There is also a synergistic element to training; when a trainer does his work well, the end product for the group is greater than all of the inputs. A trainer possesses the skill to help others release their own strength and the artistic sense to do it in such a way that the release is in tune with, and complementary to, what's going on in the whole training environment.

Science of Training

Training is applied behavioral science. Behavioral scientists explore the whys and wherefores of people's behavior; how people learn, why they react as they do. Trainers should start with group dynamics, a jargon term referring to the forces and impulses that make and break groups. Quite apart from personal feelings and individual personalities, there are identifiable group characteristics, and trainers need to know what they are.

Trainers must know something about individual behavior and cultivate an objectivity that permits clear views of how people behave.

Self-knowledge is important to a trainer. It's very tempting, and very easy, to use a group of people to meet one's own needs. A learning group is formed to create growth for everyone. Good trainers value time committed by others and don't steal group time for themselves. Groups organize effective resistance to manipulation of that sort. Initially, one can milk some adulation or attention, or hostility out of a group. Unfortunately, the group suffers because its focus is on the trainer instead of group tasks. These situations often occur when neophyte trainers work their own agendas for lack of understanding of any other agendas. They grasp what seems real to them and end by pursuing their own concerns. Therefore, self-knowledge is a must. Just how one goes about getting it is another matter. The psychoanalytic route is long, expensive, and a massive over-kill for your purposes.

T-groups and personal growth groups serve the purpose admirably but eventually become marginally effective as one becomes "group wise" and clever at avoiding adverse confrontations and feedback. Co-training with a senior trainer provides another means whereby self-awareness in training can be increased, and, finally, functioning as a lead trainer is the most effective way of all, especially if one has developed ears to hear about himself.

Another element of training is technical in nature. Training experts are technically proficient in providing learning experiences, working them well, intervening appropriately, speaking clearly and concisely, giving good directions, and managing conflict. These are acquired "stand-up" skills, or what a trainer does when he's in front of a group.

Designing is another type of skill. Designs make or break training events. A poor design is an albatross on the neck of a good trainer and will finish him off despite his skill. On the other hand, a good design will go a long way towards creation of the synergism we mentioned. Designing is a skill trainers must have--a core skill. A trainer without a design is not much more effective than an innocent bystander.

With appropriate knowledge and skills, one is scientifically equipped to undertake training.

Art of Training

There is also an artistic dimension to training. It triggers the mechanical-scientific aspects and causes them to come alive.

Chief among the artistic requirements is a genuine love of people. By love we don't mean erotic or sentimental love, though both are legitimate ways of caring. We mean love that takes humans seriously, optimistically, and respectfully. Human beings are the world's most complex animals and are occasionally difficult to deal with. Unless you are willing to encounter humanity with a large measure of care, you shouldn't opt for training.

Training is a process of creating environments wherein people can systematically come to grips with their own reality and learn from it. There is, quite naturally, a good deal of rough and tumble associated with training and some pain. Trainers are prepared to face these phenomena matter of factly but emphatically--without thoughts, words, or actions conveying the "You ought to..." message. A trainer's love for people is manifest by his trust in them--trust in their openness to adventure. Training events that lack the substance of responsible human love are plastic, mawkish, and incredibly dull.

Imitation is an age-old learning device. Trainers continuously model behavior. If they are late, others may be late. If they are punishing, others may be. The relative effectiveness of learning by imitation is unknown but probably of greater significance than we suppose. There isn't anyone who doesn't vividly remember an important adult model--teacher, parent, officer, boss, or someone whose behavior merited attention and imitation. It's not necessary, of course, to conform to a pre-ordained, external moral standard or try to act out someone else's "model trainer" role to become a decent trainer. You can be yourself. The real issues at stake are consistency and congruence. If you say one thing but act to the contrary, you send mixed signals and are incongruent. The participant is much more likely to imitate your actions than your words. There are no rules to guide you in this area. Simply try to conduct yourself in ways that don't violate the rationale or the principles you're trying to share--and get feedback to help you.

We all have favorite behaviors which are the first we bring out for exhibition but which may be grossly incongruent with the model of adult education we've been talking about. For example, someone who speaks well may continue to do so in a training group, on... and on... and on. Perhaps participants are even raptly attentive, but the result is the same as if they had gone to a lecture because active trainee participation doesn't take place and the adult education model is violated. And yet, the trainer is doing his genuine best. His best is incongruent, however, and unless he receives feedback, he will never know of his failure.

Don't take responsibility for someone else's learning. That's not to say you don't care one way or another whether trainees learn. You do care. But after you've done your best, the learner will interpret and assimilate what he can in the manner most appropriate for him. You've got to trust him to do that. Otherwise, you put him down.

Occasionally, trainees will try to box you into taking responsibility for them. They will ask you to act like a teacher. They've been used to being pretty passive, and they find more demanding approaches different and unsettling. Don't let them do it.

Summary

A trainer's job is to orchestrate learning sessions. He is technically well trained in the behavioral sciences and the use of learning techniques. Like any good artist, he makes his job look easy. Of course, it is not. A trainer is a lover of mankind, a well qualified lover who is able to create contexts in which others can learn. Most of all, trainers do not take responsibility for the learning of their trainees. Instead, they constantly encourage trainees to take responsibility for their own progress in learning.

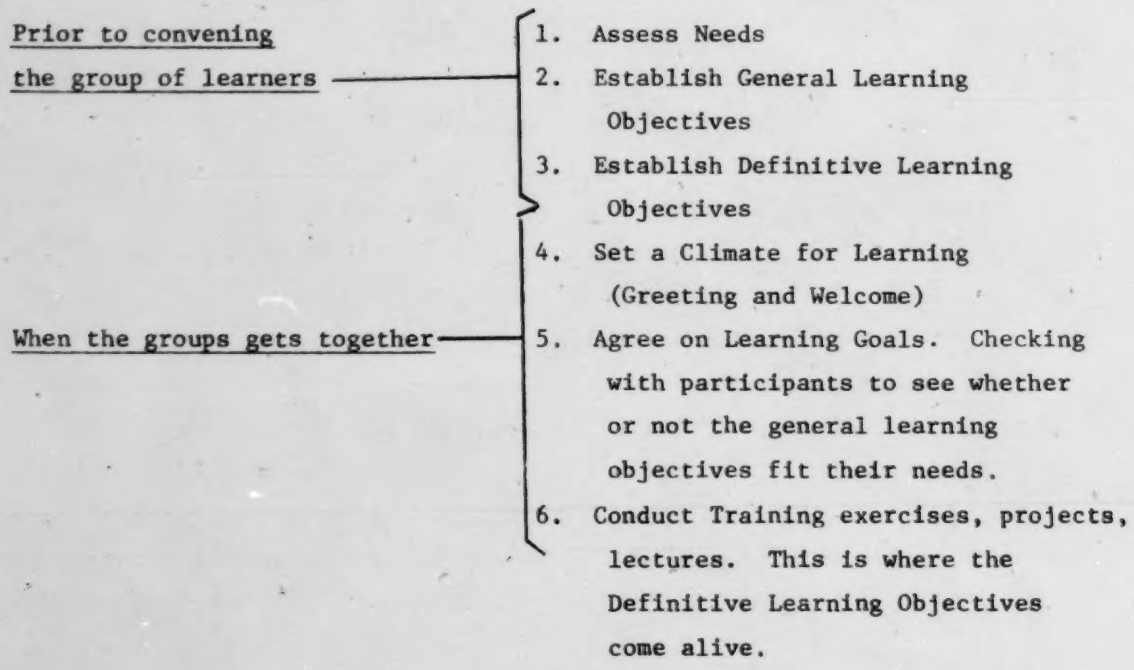
NEED ASSESSMENT AND ESTABLISHING OBJECTIVES

This section will help you learn how to design training programs. Like most beginning trainers you're probably more anxious about techniques and methods than you are about design. Techniques are great if you have a goal but not much help without one. This section will help you create the design that is essential if training techniques are to have any impact.

Designing is putting it all together. We'd like to share a seven-step design process with you:

1. Assess Needs
2. Establish General Learning Objectives
3. Establish Definitive Learning Objectives
4. Set a Climate for Learning
5. Agree on Goals for Learning
6. Conduct Training
7. Evaluate Training

Of the seven steps, the first three are done before training actually begins. Steps 4 and 5 are the very first steps taken when you meet your group. Step 6 is the most important and difficult. Step 7 caps it off.


Prior to convening the group of learners
When the groups gets together
1. Assess Needs
2. Establish General Learning Objectives
3. Establish Definitive Learning Objectives
4. Set a Climate for Learning (Greeting and Welcome)
5. Agree on Learning Goals. Checking with participants to see whether or not the general learning objectives fit their needs.
6. Conduct Training exercises, projects, lectures. This is where the Definitive Learning Objectives come alive.

At the end of training — 7. Evaluate Accomplishments. Check to see what has been accomplished and what else needs to be done.

Ready?

We'll begin with assessing needs and setting objectives, but before we do, let's try to put design in some sort of context. The seven steps are a checklist. The steps are linear. This manual begins with step 1 and goes right straight through. However, a linear progression is not necessary, and most people don't create designs in a linear way. Some start by thinking of methods; others start with objectives. However, no matter where you begin, all the basic steps have to be included.

Some training designs are informal and simple. For example, for an hour training session, do you need 20 pages of plans? Scarcely. But you do need to know what you want to happen even if the design is all in your head.

Needs Assessment

What do you need? We suggest that when you begin a needs diagnosis prior to training, *begin with problems*. Problems are easier for people to talk about and usually a lot clearer than needs. Moreover, if you can talk about problems rather than training needs, you get a glimpse of the situation at the level that permits you to make a professional judgment as to whether or not training is needed. For example, if the volunteer tells you he/she needs a series of sensitivity training sessions, he has offered you a training solution. But, to know whether that solution is sound, you must know more about his/her problems.

A training need is the description of the kind of training or re-education required if volunteers are to solve problems they can't presently solve with the skills they have. So, what you do first is ask: "What sort of problems will volunteers meet that they'll be expected to solve?" With that information you'll be able to say, "The training they need to solve that problem is the skill to do A, B, & C and knowledge about D, E & F."

Need assessment is not difficult. There are, however, some guidelines and thoughts to keep in mind--and practice helps a lot.

First, identify problems and then translate them into learning needs--if learning will solve the problem. Sometimes it won't. Often some other intervention is called for, perhaps an administrative change, an infusion of cash, or additional staff. For example, if one of your projects is an overburdened information and referral service, you wouldn't suggest training if the real problem is a lack of phones. Training won't solve everything, particularly lack of money, insufficient space, or poor public relations.

Look at the problem and then ask yourself whether training will help solve it. Suppose the problem is to establish a legal aid program for poor and minority group old people. Will training help? Partly. First you must get some volunteers. After that, you'll need to provide training in (1) legal problems of older people and, (2) cross-cultural and cross-generational communications. Notice that part of the problem is recruiting and part of it is logistical. Training alone won't do the job. The training component is only a part of the whole.

So far, so good. You've looked at a problem and identified at least one training component. How do you then translate a problem into a training need? Look at the last example again.

Problem: You have some law student volunteers but they don't know how to counsel poor older people about their legal problems.

Training need: _____

You're right; volunteers need to learn how to counsel and interview. You've identified a skill volunteers will need to learn and in so doing have described a training need. Try another.

Problem: Your volunteers have never worked with minority group elderly people and know nothing of their culture.

Training need: _____

If you said volunteers need to learn to appreciate the history and value of minority cultures, you're right. And that is how you translate a problem into a training need: Identify knowledge, skills, and attitudes that people need and can learn and use to solve known problems.

For the most part, you will train volunteers for projects you know well. The training needs are obvious and require little data-gathering and analysis. It isn't difficult to discover or infer training needs. Besides, you're much more familiar with your own organization than anyone else and probably already have a good sense of what's required.

But suppose you don't know the projects well and consequently you are not sure about training needs. Who do you ask? How do you get the information?

Go first of all to the people with whom the volunteers will work and who will supervise them. Ask what volunteers will be expected to do; how they will be expected to act. Check with the volunteers themselves when the time comes. Ask others who have been involved in the same program. Ask those who will receive the service how a competent volunteer should act. Get help from people in your community who do training; for example, civil service trainers, Volunteer Action Centers, colleges, etc. Get as many people involved in need assessment as you can.

One caution, however. Don't go on forever assessing needs just as if you had to know everything before going on to the next step. That isn't necessary. Begin training as soon as you can and begin with the most immediate need.

Types of Learning

One of the biggest factors in needs assessment is the ability to tell what type of learning is needed to solve a problem. There are three learning areas that are generally used and cover most training needs.

They are:

--Intellectual Knowledge: Analysis, memory, facts, etc.

--Skills

--Emotions, feelings and attitudes

Intellectual Knowledge includes analysis, synthesis, knowledge acquisition, memory, facts, rationales, and systematic philosophy.

The *skill area* includes operations which people perform to accomplish tasks. Counseling is a skill. A complicated one, but nevertheless a skill. Managing an information and referral center is a skill. All require brains and knowledge, but the dominant component of the operation is in the necessary skills.

The last area of learning includes *values, feelings, and attitudes.* Inter-generational encounter groups designed to change attitudes and feelings are examples ofthis kind of training. Another example of attitude learning are sessions in which volunteers share their feelings and reflect upon them for depth of insight.

We'll use these terms again when discussing how to set objectives. For the present, try to think of problems in terms of learning areas. The reason for doing so is that training needs must conform to the problem. If the problem revolves around poor attitudes, don't develop a training program that provides information about attitudes. Develop one in which people have a chance to actually express their attitudes and assess the consequences of having attitudes such as a bias against older people. Or, if you want people to learn a skill, provide a training program that gives participants a chance to practice the skill. Try putting the following into their proper learning areas.

1. History of a culture is in the_____area of learning.
2. Typing is in the_____area.
3. Empathy with a minority group is in the_____.
4. Interviewing is in the _____area.
5. Frustrations generated because plans are not working well is in the _____area of learning.

Answers:

1. Intellectual. This is information; head work.
2. Skill. Typing is essentially a motor skill; body and hand work.
3. Emotions and attitudes. Empathy is a emotional response; a feeling.

4. Skill. This is a little harder because interviewing also requires knowledge. But, the dominant area is skill; doing something with the body (and the mouth in this example).
5. Emotions and attitudes. Feelings are not rational. They're simply there and need to be taken into consideration.

How are you doing? We'll treat this again later, so don't worry too much about it if you're having trouble. Remember, the areas are simply handy categories to simplify your needs assessments.

Right now, think of need assessment as a necessary but relatively simple task. Before we leave the subject, let's see what you can do to make an assessment more accurate.

Checklist

What You Can Do To Increase the Accuracy of Needs Assessment For Training

--Define the problem: Do the volunteers need counseling skills or do they need transportation? Or both?

--List new skills, knowledge, and feelings that would solve the problem: counseling skills, knowledge of the role volunteers are expected to perform, high degree of empathy with older people, etc.

--Identify behavior for which people can be trained: counsel older people, listen, interview, initiate contacts with strangers, give information over the phone, and manage a budget.

--Categorize behaviors by area of learning: intellectual, skill, and emotions and attitudes.

--List training you know how to do.

--List training you aren't qualified to handle.

--Get others involved in the assessment, particularly volunteers themselves.

--Recognize the limitations of training. It can't solve every problem.

What You Can Do To Botch a Needs Assessment for Training

--Not make one.

--Look at the world solely in terms of the kind of training you're personally capable of doing.

--Make the assumption that training can solve the problem.

--Not have a clear idea of what you can do.

--Not define the problem.

--Not involve others.

Some Signs that Will Tell You the Need Assessment was Incomplete

--You haven't the foggiest notion where to begin.

--Participants keep asking, "What are we doing this for?"

--You can't write any objectives . . . or even think of any.

--The learning areas aren't clear to you and others.

--You spend a long time looking at your shoes when someone else asks you what needs your training program will fulfill.

The following examples may be used to test your ability to ferret out training needs. Use them if you like.

PROBLEM	
Poor and minority group older people need legal counselors	
NEED	The learning area is:
Volunteer counselors to work on the project.	Intellectual o
	Skill o
Is this a Training Need? [ ] Yes [ ] No	Emotional-attitudinal o
	Not applic. o
NEED	The learning area is:
Transportation for legal volunteers.	Intellectual o
	Skill o
Is this a Training Need? [ ] Yes [ ] No	Emotions and attitudes o
	Not applic. o
NEED	The learning area is:
Acquaint volunteers with minority cultures	Intellectual o
	Skill o
Is this a Training Need? [ ] Yes [ ] No	Emotions and attitudes o
	Not applic. o

Answers on next page.

Volunteer counselors--No; No applicable learning area.

Transport counselors--No; No applicable learning area.

Acquaint counselors--Yes; Intellectual learning predominately and emotions and attitudes secondarily. Refer to pages 19-20 if you had trouble with this one.

This is a simple form that may help you with a needs assessment.

NEED SURVEY FORM

Problem	Needs as seen by the trainer	Needs as seen by the volunteer/ others	Needs common to both lists	Learning areas

Establishing Objectives

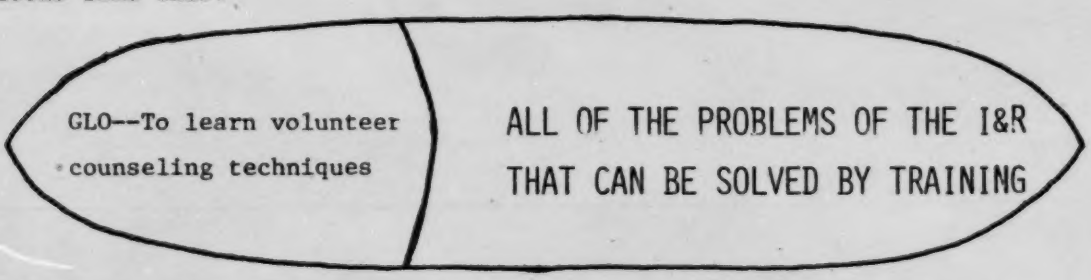
The volunteer's needs and problems are numerous and only some of them, perhaps very few, are open to training solutions. Even those that are training problems can't all be handled at once. So, your first task is to make a selection. Somewhere in that pile of needs there are some you can and should handle. Zero in on those and make a selection you can deal with. Don't worry about those you can't handle.

Make a selection and begin training as soon as you reasonably can. Not only will more problems surface as you go along, but your work will affect the very shape of the problems and the training environment. It happens both ways. Besides, a training session is often the best way to get at training needs. The climate is right for people to share training inadequacies they wouldn't dream of sharing in other, less secure circumstances.

Once your training selection is made, you are ready to decide on what we call a *General Learning Objective (GLO)*. A GLO is a statement of the problem in training terms. For example, suppose the problem is untrained volunteers for the Information and Referral porject of the Area Agency on Aging. Translated into a General Learning Objective (GLO), the same problem would look like this:

GLO--To learn volunteer counseling techniques

Graphically, the selection of a need and establishment of a GLO looks like this:



You're trying to solve only a part of the I&R's problems--the part training will help with.

This GLO must relate directly to the problem. You have selected a problem that is well within your capabilities and expressed it in a way that clarifies the learning component.

Here is the way it might be expressed:

NEED

To provide volunteers with training in counseling techniques

GENERAL LEARNING OBJECTIVE

To learn volunteer counseling techniques appropriate for the Information and Referral Service.

USE THIS SPACE TO TRY ONE FOR YOURSELF

NEED

GENERAL LEARNING OBJECTIVE

Now you have a General Learning Objective (GLO); but it is general--vague. The next step is to clarify and define this area you have decided to concentrate on.

Definitive Learning Objectives

You need *Definitive Learning Objectives (DLO's)*. Until you get them, you can't design a training program that's very specific. A Definitive Learning Objective is the final and most essential step in the process of setting objectives for training. The DLO is a specific, concrete, identifiable training objective directly related to the General Learning Objective. A DLO is to the General Learning Objective what individual plays are to a football game. They are complete; each is a distinct unit, and together, in a variety of combinations, DLO's move toward resolving the General Learning Objective.

NEED To provide volunteers with training in counseling techniques.
GENERAL LEARNING OBJECTIVES To learn volunteer counseling techniques appropriate for the Information and Referral service.
DEFINITIVE LEARNING OBJECTIVE Be able to list nine of the 10 most important service agencies in the area without notes or other aids.

Does one DLO accomplish the whole General Learning Objective? No. But you need several DLO's put together in appropriate sequences to accomplish your General Learning Objective. What we've been talking about is a process by which large, amorphous problems can be whittled down to manageable units of training.

Criteria for Writing Definitive Learning Objectives

Let's dissect a DLO and see what makes it tick. There are three criteria that make a DLO so useful. The criteria are:

1. The objective must be observable or measurable.
2. The level of acceptable performance must be listed.
3. All the important conditions for performance must be listed.

Measurability

Is our selected DLO measurable by ruler? A measuring spoon? A stopwatch? No, it isn't. The measure is:

. . . A LIST

LIST is the key word. This is how you measure whether or not participants have learned anything. We ask them to do something; to engage in some kind of behavior that is clear to everyone--in this example, to make a list of service agencies. That's what measurability is all about. Call it what you want; measurable, behavioral, observable . . . the result is the same. Participants must be able to do something they couldn't have done prior to your training--list, write, recite, enumerate, separate, record, demonstrate--all measurable, do-something verbs. Not general, less measurable verbs like appreciate, or contemplate. That's the clue to whether or not a DLO is in the works--the *verbs,* and whether they express actions that can be measured easily and directly.

Test yourself. Place a mark in front of the measurable objectives:

1. Participants will know the purpose and history of the Area Agency on Aging.
2. Participants will record the regulations governing the emergency systems in area hospitals.
3. Participants will write the name of every psychologist in the city.
4. Participants will really understand the role of an I&R volunteer.

If you checked number one or four, you're wrong. Neither you nor anyone else can measure "knowing" or "understanding" just by themselves, and "really understanding" doesn't make it any clearer. If you want to measure knowledge, you will discover yourself asking people to write, recite, or list, something to demonstrate their knowledge. So why not start that way and not bother with the vague verbs at all? Make life easy for yourself.

Level of Acceptable Performance

If you write a Definitive Learning Objective related to helping someone run the 100-yard dash, is it safe to assume that you would give him four hours to run it. No. An Acceptable Level of Performance is that the dash be run in 9 - 14 seconds. DLO's should have a clear statement of the level of performance participants will be able to demonstrate after training.

The importance of this criterion is that it helps the trainer focus on his design and training methods. If he wants a very high level of performance, he will have to provide time, practice forms, and a variety of designs to reinforce the material.

We'll provide you a couple of Definitive Learning Objectives (DLO's), and you pick out the measure and the level of acceptable performance. Start with the example we have been using. It is in the knowledge area of learning.

- At the end of training, volunteers will be able to list 9 of the 10 most important service agencies in the area.
- The measure is_____.
- The level of acceptable performance is_____.

If you said, "List service agencies in the area" is the measure, you're right. "List" is the verb that describes what the volunteer can do after training.

If you said "9 of the 10" is the level of acceptable performance, you're right.

This means the volunteer has accomplished a definitive objective if he gets 9 out of 10 right.

Try another. This example is in a Skill.

- At the end of training volunteers will be able to refer each caller to an appropriate resource in the area.
- The measure is_____.
- The level of acceptable performance is_____.

If you said the measure is "Refer each caller," you're correct on your first answer.

If you said "each caller" is the level of acceptable performance, you're only half right. "Each caller to an appropriate resource" is the whole level of acceptable performance. Any one could randomly and continuously refer every caller to someone or other. But it requires a skilled volunteer to make a judgment about the nature of the problem and make an appropriate referral. That's the level you're looking for.

Now let's go on and look at the third and last criterion of a Definitive Learning Objective.

Conditions

In a good DLO, the conditions under which the learner will perform are noted. In our original DLO example the conditions were expressed as ". . . without notes or other aids."

Why bother? Because it helps the trainer select techniques and methods to accomplish the training. Also, as with the Level of Acceptable Performance, some design directions are indicated by conditions. For example, conditions are often positive, allowing the person to work with a partner, or a group, or to use books and notes as aids and guides. If you think of those conditions beforehand, you have some idea of the kinds of learning exercises to provide. A positive condition in our example would allow the participants the privilege of using their notes. What we have written is a negative condition; pupils are not permitted any aid other than their own memory.

To summarize, the criteria for a Definitive Learning Objective are:

1. Measurability
2. Level of Acceptable Performance

3. Conditions--positive or negative

Check the criteria you find in the following DLO's.

	Measured or Observed	Level of Accept. Performance	Condition
1. Participants will list eight of ten procedures.			
2. Participants will understand the six steps of the problem solving process without the aid of notes or assistance from others.			
3. Participants will recite 9 of 10 counseling styles without the aid of notes, books, or charts, but with the aid of other participants.			

Answers are on the next page.

If you didn't get checks in the correct places you may wish to reread some of the material we have already been over. You should be able to identify all three criteria of a Definitive Learning Objective before going on.

Answers

	Measured or Observed	Level of Accept. Performance	Condition
1. Participants will list eight of ten procedures.	X	X	
2. Participants will understand the six steps of the problem solving process without the aid of notes or assistance of other participants.		X	X
3. Participants will recite 9 of 10 counseling styles without the aid of notes, books, or charts, but with the aid of other participants.	X	X	X

The Skills Area

So far we have been talking mostly about acquiring new information. You may be thinking, "OK. But there's more to training than listing and reciting." There is; a whole lot more. One item is the entire area of skill acquisition. Just because you can repeat information doesn't mean you can do anything with it. Sure, you can list ways to improve communication; but putting those ways into practice is another story. Or more to the point, it needs another DLO.

A good part of all training helps people acquire new skills or polish old ones. If Definitive Learning Objectives are of any value, they should be applicable to skills training.

Let's look at examples.

--Participants will be able to type 80 words per minute with no more than four errors.

--Participants will be able to role-play a 15-minute interview. The quality of the performance will be judged by the trainer and other participants according to the principles of interviewing discussed and demonstrated during the training session. Participants will be permitted to use notes.

--Participants will demonstrate the ability to use a 16 mm sound projector. The demonstration will be successful if the participant threads the film so that the picture and sound are synchronized. The projector will be supplied by the trainer.

May we offer a hint? If you're having trouble writing DLO's, write them in a shorthand way first. Put down some words and phrases that capture the essense of what you want. Polish and perfect later. This avoids having to write a perfect DLO from beginning to end right off, a tough task and not very much fun. Please don't let yourself get pushed around by this system. A DLO is just a tool, after all.

Here's an example of what we mean by shorthand. Suppose one wants to help people with interviewing skills. The shorthand notes for the role play interview example might have started out like this.

Measurability: Demonstrate interview system in 10-minute role play?

Acceptable Performance: Our judgment confirmed by rest of participants?

Conditions: No notes! Just like real thing--without a coach.

Sometimes that's all the writing that may be necessary. Other times a more polished DLO is needed. Either way is all right.

Emotions and Attitudes

"I know the principles of good counseling, and I can use all the techniques. But I don't like poor old people. They drive me up a wall. I'd rather not talk to them."

Now what? You just trained a person to do a technically competent job. He has the knowledge and the skills he needs. But he still can't be an I&R volunteer. You've now got a training task in what is in the *emotions and attitudes* area of human activity. Can you write a training

design to help? Yes, and the objectives can be measurable, but writing DLO's pertaining to emotions and attitudes is difficult. The problem is that you can't see an attitude or feeling change. All you can do is look for secondary behaviors and infer changes in values, feelings, or attitudes. Let's try one:

--Participants will evidence an attitude change about old people by exhibiting some of the following behaviors:

-making unsolicited comments like, "Good grief! I didn't realize that before!"

-consciously expurgating sensitive phrases and humor about the elderly from their conversations.

-candidly discussing their own shortcomings in terms of attitudes, rather than saying, "Some people think . . . "

The above behaviors must take place without the trainer suggesting change or programming the volunteers. Setting objectives in this area is an imprecise art at best and is the most difficult to work with. One needs all the DLO criteria to work in this very sensitive area, especially the conditions like making sure comments are unsolicited. Even though emotions and attitudes are delicate, they are present in every training session and are of immense importance.

One more hint. Here is a simple formula for writing DLO's in the area of attitudes and emotions:

1. First state the area of the attitudes and emotions you are training in. Example: At the end of training session involving role play, participants will evidence their increased confidence in . . .
2. Then list a series of behaviors that tend to indicate their increased confidence. Example: Saying--"I think I can do it." "I'm ready to try a real one." "That wasn't so bad." Etc.
3. Then put in any conditions that might be necessary. "Without group pressure to make positive statements and demonstrate a willingness to accept failures as well as successes.

May we offer another example of a DLO in this area? Try this.

•After training most participants will evidence increased sensitivity to the feelings of older people by spontaneously making such typical remarks as:

"It would really be a drag getting old when everything around you is centered on being young."

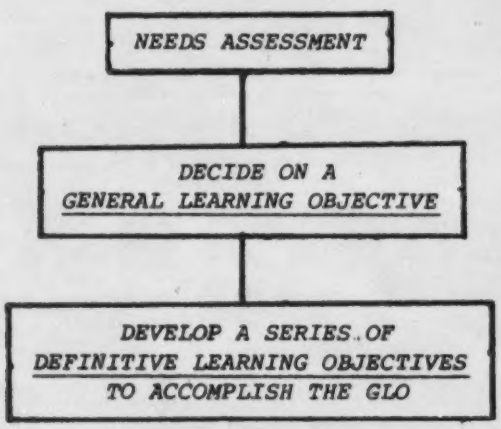
"I'll bet old folks get tired of being talked down to."

Notice in this DLO example words "most" and "spontaneously." They establish the level of acceptable performance and the conditions. Obviously, volunteers won't make these exact statements. But they should indicate by some expression, verbal or nonverbal, that a change has come about in attitude or feeling.

The DLO Process

This, then, is a system for writing Definitive Learning Objectives. It is a flexible method that you can use in your own way. Most important, you use the system. Never let it use you--or trainees. Clearly Definitive Learning Objectives describe terminal behaviors. They are never imposed on trainees as if they were children. Definitive objectives are what trainees may reasonably require of you to help them meet their own objectives which grow out of their own needs.

The process looke like this:


NEEDS ASSESSMENT
DECIDE ON A GENERAL LEARNING OBJECTIVE
DEVELOP A SERIES OF DEFINITIVE LEARNING OBJECTIVES TO ACCOMPLISH THE GLO

It's doubtlessly apparent by this time that the intent of the system is to provide precise, systematic, controllable learning that meets specified needs. In this context, a couple of things are worth remembering: (1) Definitive Learning Objectives describe what the learner will be able to do after training but not what the trainer will do to help get him there; (2) the process of making a needs assessment, selecting a General Learning Objective, and writing Definitive Learning Objectives, is the way a trainer draws a map that shows where the learner is and where he is going and what he must do to get there.

Should you share your Definitive Learning Objectives, your map, with learners? Sure, if you wish; with the exception of the DLO's in the area of emotions and attitudes. Here, the behavior you'll be looking for should be unsolicited and spontaneous.

Start a training design of your own.

NEED

GENERAL LEARNING OBJECTIVE

DEFINITIVE LEARNING OBJECTIVE

WHEN THE GROUP GETS TOGETHER

Right now here's where we hope you are:

- You know how to make a Needs Assessment--to define a training need...
- Can translate it into a...

General Learning Objective (GLO)

- and then write...

Definitive Learning Objectives (DLO's)

that give active meaning to the GLO.

NOW WHAT?

So far, you know what the volunteers ought to be able to do after training. But you haven't got a group together yet, nor do you have any methods. So first things first. Let's talk about groups and group characteristics, then on to climate setting and goal agreement.

Managing Groups

By a group we mean six or more people. Size makes a noticeable difference in terms of the rate of progress. A small group can move faster than a large one. In a large group you're likely to hear the complaint, "We're moving too slow."

You can do a variety of things to liven the pace of a large group: (1) create smaller task groups that can work independently; (2) actually move faster through the material; (3) create a climate of briskness by starting and stopping on time and reducing time required to generalize; and (4) putting up a schedule so people can see how far they've come and what they must do to finish. Unfortunately, one slow person can hold everyone back. That's one of the problems of group work that learners and trainers both have to live with.

The advantage of a large group is mainly that of resources. There are more people to work with, and more interactions and perspectives are possible. But a trainer must be skilled at orchestrating to make use of these advantages.

A small group is usually easier to manage, but it is limited to a lesser variety of innovations because everyone ends up doing every exercise.

Small groups offer limited human interaction. People get to know one another up to their chosen limits rather rapidly. Then there's no one else to engage, a certain edge is gone, and the vitality is difficult to maintain.

A trainer energizes a group. He doesn't motivate it. Learners come with their own motives, but the group leader sets the pace or the beat. Much depends on your personal style. Some people brim with energy and work a group up very rapidly; the pace is fast, intense, and powerful. Others start slowly, build a solid web of trust, and don't reach full power until much later. It's important to remember, whatever your style, that you're setting the style and the group is responding.

Lateness and Absence

How do you get people to come on time, and to show up at every session?

Lateness, unexplained absences, and like behaviors drain an incredible amount of energy from a group and cannot, over the long run, be allowed to destroy it. You cannot stand meekly by and watch the process without abdicating your responsibility to help the group control itself. What you can and should do is make the consequences of retarding behaviors clear and give people the opportunity to set group norms that all agree to. You must also take some (but not all) of the responsibility for enforcing the norms. Suppose, for example, punctuality is initially agreed upon as a group norm, but it doesn't happen. Our response is not to punish individual late-comers but to raise lateness in general as an issue at a propitious time. "We agreed to punctuality. It isn't happening. What do you choose to do about it? We can forget it, but if we do, X, Y, and Z are the consequences. Or, we can change our behavior according to the norm. Let me know and I'll be here when you really want to meet."

When people are unaccountably absent, everyone else wonders why. Anytime a member of a group wants to learn from others and interact, absence is both noticeable and a problem. You can help by making your own expectations clear in the beginning.

Dawdling--War Stories

How do you handle the person who wastes the group's time by sharing his own experiences at great length?

We call this problem the War Story Syndrome. Your responsibility is to manage it. You don't want to stop it entirely because some people need to tell stories to feel comfortable. On the other hand, you can't let the War Story get out of hand. Avoid the dilemma by providing a place for War Stories in the climate-setting phase. Let people feel their way into the group. Later, when you begin sharing goals and expectations, describe the effects of War Stories and point out their liabilities. On this basis you can take responsibility for monitoring them, and ask others to do the same. If, however, one or two people don't hear the message and continue to recount the story of their lives, intervene. Simply ask if they would like to speak about something everyone is interested in, or simply say the story doesn't appear to concern most of the others.

Climate Setting

How do you make a group feel comfortable?

This is called climate setting. It is really a greeting, like saying "Good morning," or "Welcome" One could take it for granted were it not for the fact that adults have self-images of independence and are often suspicious of schooling and training. They don't always feel comfortable in groups, and initial meetings are often edgy. Edgy people don't learn well. So, prior to the beginning of training, participants must feel comfortable and get adjusted to their environment.

Climate setting addresses three general concerns of learning groups:

--Trust

--Membership

--Expectations

Trust

Dialogue is impossible without trust. Participants need to develop trust in you, trust in their peers, trust in themselves. Trust is developed

when people concretely and truthfully show their intentions. If actions don't correspond with words, there's no evidence of intention and therefore no trust. Trust should be consciously developed rather than left to chance.

These are some universal qualities which should be present in the first session. You'll want to set a climate in which each participant becomes aware of his own uniqueness and where the relationship between the trainee and the trainer is cordial, open, and supportive. In addition, physical arrangements should be as comfortable as possible. They should reflect the idea that adults learn best in convenient, informal surroundings.

Climate setting can begin before the group is convened. For example, mail out a brochure or pamphlet written in such a way as to set the tone of the training session--breezy or serious. Pre-involvement instruments, like a learning needs assessment, also may be distributed. They engage the participant in planning for his own learning by asking him to set forth his goals and objectives, or they pique his interest with a statement, a question, or even a case.

Don't rely on pre-involvement instruments to fully explain the purposes of the training. You'll need to do more when the group convenes.

How should I handle the first session?

The first session is the most critical one. If a positive climate is established then the remainder of the training will be greatly enhanced There are several climate-setting events in the first session: greeting, introductions, and trainer-trainee relationship building.

Occasionally there is the chance to have a short cocktail party, coffee hour, or similar social event prior to training. This gives the volunteers a chance to meet with trainers and co-participants on an informal and non-threatening basis. The atmosphere is congenial and informal.

Some training sessions are so short that pre-training social events are not feasible. Then introductions, if needed, may begin the session. If a group is small, everyone may introduce himself, or a pair may introduce one another, giving background information suggested by the group. If there is a large group, it can be reduced to small sub-groups for purposes

of personal introduction. Everyone should be given an opportunity to make his own name known. Nothing is so embarrassing as calling someone "what-shername" after four days together.

Greetings should convey warmth and respect. Participants who see themselves as valued group members are well on the way to sharing their own unique insights and skills. A cordial, informal welcome reflects the adult's image of himself as a valuable and interesting human being.

Introduce helpful information about logistics and administrative matters early. Give participants an opportunity to ask questions about topics you may have overlooked--facts they may need to know to be comfortable. That way they begin the process of participating in the training themselves. Right at the beginning of a training session people get a clear idea of the direction their training is heading, the way they will be treated, and how they will be able to contribute.

The trainer has to transfer his power to the group as a whole. This power transfer is a curious and delicate phenomenon. Participants feel more comfortable with traditionally powerful leadership from a teacher, but they resist it on grounds of adult independence. There are two extremes that the trainer must avoid. The first is called the General Patton Syndrome. The trainer clearly indicates who's boss and presses on at his own pace. Some participants feel secure in the hands of such obviously strong leadership. Most don't, and participation and trust are likely to be low. The effect is the same even when a trainer lays down the law with a fist in a velvet glove.

The other extreme is the Dummy Syndrome. The trainer claims no power, no influence, no preferences, nothing. One of his opening gambits may be, "Well, what would you like to do?" This only confuses and upsets trainees. A trainer of this sort has a poor notion of what self-directed learning is. His own aimless intellectual sprawl is a hindrance. Trainees didn't convene the session, and they can't be expected to control it. The trainer's abdication leaves them without direction or support. It can be a nightmare.

The trainer finds the balance between the Patton and Dummy extremes when he takes initial responsibility for transferring power. He guides by

helping people join the group and helping them to offer their ideas and make suggestions. He actively and consciously helps others participate by eliciting responses. He communicates his leadership and the impression that he is able to handle things instead of acting like he doesn't know what's going on.

Initially, the trainer will assume most of the control. He will have a suggested working structure for the body of the workshop in mind, and he will certainly conduct the climate-setting exercises necessary to get the group started. Otherwise, who needs a trainer?

Membership

Membership is the issue of belonging. It is both a psychological and an intellectual issue. Of the two, the psychological dimension is strongest.

For example, people who don't have much formal schooling often assume that the cost of belonging to a learning group is either more education, a smarter head, or a larger vocabulary than they possess. As a result, they may respond passively because they perceive themselves as on-lookers--not as genuine members of the group.

Membership norms should be established during climate-setting. For example, the trainer can state explicitly what previous experience is appropriate to the group and what different levels of experience are represented. Participants should be encouraged to state their agendas and objectives. The more public information, the better groups are able to function.

The process of establishing secure membership in a group usually persists for almost as long as the group lasts, and it is characterized by occasional ups and downs. It is unreasonable to expect everyone to establish membership at once and consistently maintain it. Some form of belonging must be reached for everyone, however, or learning will be greatly inhibited. Trainers can nurture membership, taking pains to include those who are having difficulty getting involved. This includes talking with them at breaks, encouraging them, and openly revealing any clique forming or social games people sometimes play. Most important, a trainer must be objective and treat everyone with equal respect.

Expectations

How do you let the group know that it shares responsibility for training?

It is difficult for a learner to conceive of a learning situation in which he shares responsibility. Therefore, when you indicate your expectations of people, you are introducing a new concept. People may intellectually understand what you say, but unless they are experienced self-learners, their behaviors and feelings will tend to flow in the other direction. They will still want you to assume the accustomed teaching role, particularly when the going gets tough. The expectation of self-responsibility must be reaffirmed and reinforced throughout the session.

This is one of the most important things an adult can learn. For example, if a volunteer wants you to tell him what he should learn, your task is to lead him into a self-diagnosis process so that he can determine what he wants to learn. If he asks for answers, ask him, "What does it seem like to you?" How would you get that information if I weren't here?" "Is there anyone here who can respond to that question?" Small groups and participative exercises take the spotlight off the trainer and put it on participants. Don't get trapped into a "telling role" where you do all the talking, all the answering, all the initiating.

There will be other expectations besides having participants responsible for their own learning. For example, you'll have some objectives in mind, objectives the trainee is expected to meet. Make your expectations explicit. It isn't necessary to impose your expectations, but you should make them explicit.

The participants will have expectations too. It is important to get these out in the first session. This worksheet is one way to do this. The example is an instrumented technique (written diagnosis) rather than a discussion technique. Both are useful.

This is a worksheet to help you express your expectations of this training and the areas you need to work on most.

I expect this training to cover_____

_____

_____

_____

The areas I need most work in are:_____

_____

_____

_____

I'm confident of my ability in the areas of_____

_____

_____

_____

I expect to spend_____(hours) in this training.

To make my time worthwhile I've got to have_____

_____

_____

_____

_____

Whatever techniques you use, the goal of climate setting is to set the stage. Participants need to develop trust in you, themselves, their peers, and the process. Trust is developed only to the extent trainees perceive themselves as members of the group. The expectations you have of them and they have of you must be shared. The best climate is supportive, genuine, informal, and non-threatening.

A Checklist

Things You Can Do To Set A Positive Climate:

--Choose a well-lighted, well-ventilated space ... a quiet one. Provide comfortable chairs.

--Arrange furniture so people can see one another.

--Provide coffee service in the room.

--Provide ash trays for smokers.

--Greet people and provide them with some means to display their own name.

--Dress informally.

--Speak informally.

--Start on time. Keep things moving.

--Greet late-comers cordially and bring them up to date.

--Provide means for people to warm up to one another personally before attempting work.

--Take time to discuss the warm-up exercise. Find out what happened to the participants--how they're coming along. Trainers call this processing. It means looking at an experience and drawing a general learning conclusion from it.

--Help participants articulate their expectations and let them hear yours.

--Relax.

Things You can Do To Bungle and Set A Lousy Climate:

--Ignore the list above.

--Arrive late...after the participants have been waiting half an hour.

Some Behaviors That Will Tell You The Climate You Want Is Being Established:

--Participants appear relaxed and informal.

--High level of social contact among participants and with you.

--Everyone is engaged; no outsiders quietly (and skeptically) looking on.

--No hesitation of participants to approach or direct questions at you.

--Smiles, nods of approval, good eye contact, everyone awake.

--Evident enthusiasm to move on.

Some Behaviors That Will Tell You A Positive Climate Is Not Present:

--Stiff, nervous people; low social contact.

--Handraising and other formal school behaviors.

--No questions and no evident response to comments.

--Nervous laughter and giggles.

--Side conversations.

--People moving chairs outside the group.

--No levity.

--An awareness on your part that you're working like hell.

--Dawdling at breaks; no evident desire to get back to work.

--Challenging, baiting comments.

--Gamesmanship, like the "what if" game: "What if someone in the group were to say he thought training volunteers is a waste of time?" rather than a direct personal statement such as, "I'm wasting my time."

Remedial Action--Climate Setting

If you've botched the initial climate-setting phase, a quick remedy isn't usually possible. It's rather like trying to repair a *mistake* right after making it. Somehow the water seems to get hotter. So, wait. Just let it alone until there is an opportunity to do more climate setting at another time, like the beginning of the next session. Or, if you're up to it, just admit the difficulty, and try something else to set climate. Usually people want to see you succeed and will try to help you out of hot water.

Goal Agreement

The only worthwhile agreement about objectives is the one the trainer finally reaches with people he's actually training. It makes no difference what others may desire--adults will utimately learn only what they personally agree to learn. Even if you build a sophisticated design with a host of objectives (a practice we strongly recommend), the final, workable contract is a design negotiated by the whole group. Otherwise, self-directed learning for adults is an empty, senseless non-term.

How do I achieve goal Agreement?

More often than not, your original need assessment data was not supplied by participants. For example, suppose you agree to assist in a neighborhood group to staff a day hospital for old people in a neighborhood. People in the neighborhood will express a few ways in which volunteers should be prepared; you will have some ideas of your own arising from your experience; and the volunteers themselves may or may not have some ideas as to how they should be prepared. In any event, you probably will have an idea of what you want to do in the way of training before the project gets under way. So, in essence volunteers "come to training" rather than shape it in direct response to their particular needs. As a result, when the trainer tries to reach a goal agreement with the volunteers, it may be that there are such wide variations between his own diagnosis and theirs that the original design is useless. Any salvation? Yes.

It is quite appropriate and well within the canons of adult education theory to engage participants in an on-the-spot assessment of their own competencies relative to an established list of competencies generated by you and others knowledgeable in the field. Approached in this manner, the participants are able to express learning needs within the framework of what they must know to complete the task of being volunteers. The procedure is usually efficient and speedy; on one side of the board, list the requireu competencies. On the other side, list the competencies people already have. At the conclusion participants don't feel as though they have been pressured to conform or to learn useless information. One assumes, of course, that

the design you build will enable participants to acquire the competencies they lack.

There are limits. A trainer cannot create one universal design into which an infinity of content fits. There may be, therefore, participant needs you cannot meet. That's OK. Don't be afraid to say so. If you have seriously misread the needs, convene either a fish-bowl* session right on the spot or suggest that participants choose a committee to meet with you for purposes of design. A clear miss on design is a rare thing unless you've missed the whole scene, essence and all, which is improbable. Nine out of ten times, your design will be close to participant needs; so close, in fact, that participants will wonder why you bothered with goal agreement at all, since there is so little difference between your general learning objectives and theirs.

What happens after the group agrees on goals?

As soon as participants and the trainer have agreed upon the goals, the whole group mutually owns them. It's no longer the trainer's responsibility to drag everyone else around to his goals. The group has goals for which the group itself is responsible. The trainer is a resource, and an important one, but not the only one. At this point, the responsibility for learning is exactly where most adults prefer it, right on their own shoulders.

The two parts of a training design specifically intended to serve as motivators for the members of the group are goal agreement and climate setting. They are meant to help people adjust comfortably to a new environment and get a clear notion of how their own needs can be met through training. Those things should help add a pinch of enthusiasm to their lives--and so much the better. That's about as far as you need to go--or can go--in motivating, other than providing useful, interesting training. Nothing is quite so tiresome as a trainer (or anyone else) bucking up the learners. Of course, if you're bored and could care less

*A fish-bowl is a group chosen from participants convened to work on a task on-the-spot while the remainder of the participants watch.

about what's going on, you'll send a signal that says the training isn't very interesting, and participants will pick it up.

So here is what you have to do: provide clear goals for participants to respond to and help them come to some agreement about goals. Come to some explicit agreement as to which goals you want to accomplish together (given available resources). That is your learning contract.

A Checklist

Things You Can Do To Reach Goal Agreement

--Provide participants with something to help them make their own goals and objectives specific--a worksheet, for example.

--Provide a list of goals and objectives your needs assessment caused you to include in the design.

--Take time to compare participants' goals with yours, and note both likenesses and differences. Check for clarity.

--List the limitations of your design.

--Provide a mechanism (small groups) whereby participants can discuss all the goals and objectives, plus limitations, and produce a revised set of goals and objectives they can live with.

--List the final goals and state the agreement publicly. Check for consensus.

--Maintain a climate of openness, trust, and responsiveness.

Things You Can Do To Muck Up Goal Agreement

--Infer, state, or in any way communicate the idea that you're going to do your own thing in spite of new data from participants.

--Be vague about your goals and objectives.

--Allow participants to be vague about their goals and objectives.

--Say "yes" to everything just to be nice.

--Keep some of your agendas hidden.

--Ignore the goal agreement phase altogether.

--Rely wholly on coffee-break rumors.

--Fail to listen.

--Fail to write down the final goals for the whole group.

Some Behaviors That Tell You Goal Agreement Hasn't Been Reached

--Passive silence.

--Lots of argument over goals; a split house.

--Remarks like "What are we going to do in this training?"

--Inability of the group to get to a task.

Games Learners Play in the Goal Agreement Phase

--Hiding real goals.

--Stating someone else's goal.

--Giving verbal agreement to a goal in a large group and taking the opposite position in a small group of their own choosing.

--Abstaining; making no commitment at all; the missing ante in the poker game.

--Pretending to be dumb.

--Running in outside information; "We were told that. . ."

--Loading the responsibility on you; "You go ahead and tell us what to do. You're the teacher."

--Reserving judgment; "I'll let you know as we go along."

--Adding goal, after goal, after goal as a tactic to block group progress.

Games Trainers Play in the Goal Agreement Phase

--Saying "yeh, uh huh," to learners' requests with no intention of changing the design.

--Rewording learners' comments so they fit the preconceived design anyway.

--Martyr: "Well, if you don't want to do what I suggest (sigh), then I suppose..."

--Keeping trainees purposely vague so they can be blamed for failure, if and when it occurs.

--Putting the whole responsibility on trainees: "Well, if you don't know what you want..."

--Contracting for a task group and running a T-Group or vice versa.

--Using learners' ignorance to mask trainer's ignorance.

--Playing dumb.

--Refusing to say a word or help in any way on grounds that doing so is a violation of the principle of self-direction.

--Hiding real goals.

Remedial Action

Goal agreement is essentially a mechanical act and is not as psychologically sensitive as climate setting. If you don't get agreement, try asking the group to help discover why agreement is hard to reach. Usually people will begin to surface concerns with which you can deal fairly rapidly. The secret is to make it a group concern. It isn't just the trainer's worry. And by all means make it public. Prevent proliferation of hidden agendas.

Summary

Thus far we've covered:

--*Need Assessment*

--*Writing General Learning Objectives*

--*Writing Definitive Learning Objectives*

We've met our group and:

--*Set the climate*

--*Agreed on the goals*

Now. Look at the design we've started on the following page.

This is for a projected two-hour session.

After that, we're ready to move into the learning activities themselves in the Technique Section.

TRAINING DESIGN

General Learning Objective	To learn the objectives of the information and referral service and techniques of serving as a telephone volunteer.
Definitive Learning Objectives	1) At the end of training participants will be able to recite all services the I&R offers without the use of notes or other resources. 2) At the end of training the participants will be able to identify by name the person to whom they will be immediately responsible. 3) At the end of training participants will be able to list the four primary functions of a telephone volunteer without aid of notes or other resources. 4) At the end of training participants will be able to demonstrate the ability to receive a client's call and process it according to established procedures. The trainer will judge the level of competence.

TIME	*FUNCTION*	*HOW*
9:00-9:45	Establish Learning Climate	Introduce self, welcome volunteers, share agenda, pass out name tags, ask participants to choose a picture from a magazine that best illustrates their reason for volunteering, share in small groups, introduce area agency and I&R staff.
9:45-10:15	Goal Agreement	1) Ask participants to write expectations of training, where they need help most, things they must have to make training time worthwhile. 2) List trainers expectations and goals; compare with those listed by participants. Note similarities, identify expectations training will not meet. 3) Check consensus, list learning objectives.
10:15-11:30	Plan for Achieving the Definitive Objective	1) Lecture-Discussion with charts and visual aids (if appropriate). 2) Question answer period. 3) Demonstration of phone techniques and procedures. 4) Role play in trios; client, volunteer, and observer.

TIME	*FUNCTION*	*HOW*
11:30-12:00	Evaluation	Verbal check to see how involved learners are; questions to see if DLO's 1 and 2 have been met; random check on DLO 3. Random role play demonstration of DLO 4 and discussion.

NOTE: You can use the design form that follows to prepare a design of your own.

TRAINING DESIGN

General Learning Objective		
Definitive Learning Objective		
TIME	*FUNCTION*	*HOW*
	Establishing Learning Climate	
	Goal Agreement	
	Plan for Achieving the Definitive Objectives	
	Evaluation	

TECHNIQUES: HOW TO USE THEM

It is important for beginning trainers to be familiar with a few techniques--how-to-do-it devices. The world of training often seems shrouded in a cloak of mystery and to some, only the occult explains a trainer's task. It isn't really that way. But it is true that a trainer does his job best when he gives the impression of effortlessly gliding along, doing and saying very little. One wonders what, if anything, he is up to, and it's no surprise that new trainers are a bit anxious about how they should get things moving. Moreover, no one wants to lose face, and especially when he's in front of a group. He wants something to do or say. If one has command of three or four sure-fire exercises, devices, or techniques, he feels a great deal more secure.

This section offers a few techniques--just a few. This is by no means an exhaustive list, but it includes techniques for every participative step of training--climate setting techniques, goal agreement and evaluation techniques, and general training techniques.

This manual will give you a start and you'll eventually recognize the relative importance of techniques. Experienced trainers rely more upon objectives and group needs than they do upon techniques. They have command of a great many techniques, true, and they even invent them on the spot, but they concentrate on the end rather than the means. They know that any number of techniques will reach the same goal.

Some trainers focus on goals and objectives and select techniques appropriate to them. Others tend to focus on techniques and then find goals and objectives to fit--which is OK as long as the objectives do fit the group needs. Each of us has to begin where he can.

The techniques included here can be used by less experienced trainers. One overall reminder: The purpose of an exercise is to create data for learning. After each exercise the data must be processed so learners can reflect upon their experience and generalize from it. An experience is not useful for its own sake or to fill time.

Criteria for Selecting Techniques

Most of us select techniques on the basis of intuition or because they feel right. There are no formulas for selecting techniques. But good trainers always stop and examine those they intend to use to be sure that they are appropriate, and there are some basic criteria that are helpful.

Comfort, Confidence, Competence

You already know that one trainer might not be able to deliver what another could do in his sleep. And you've probably seen enough variety of approach and style to know that one trainer can be comfortable and effective with certain techniques that would be awkward or impossible for another.

Don't be afraid to say, "That approach is not for me. It makes me uncomfortable." One of the marks of the professional trainer is his ability to be in touch with his own skills and feelings.

Another thought to keep in mind is that it is usually nonproductive for learners to pin a trainer down to a packaged design in the hope of having a more structured training session. The trainer has to decide what he's comfortable doing and how he will operate best. As training proceeds, he must have flexibility; he must be able to select the techniques and design of the learning experiences. In these areas he should not be controlled by the group but simply be in tune with it.

In any event, it is clearly a mistake to allow yourself to be forced into using techniques about which you are unsure. If you don't feel comfortable, confident, and competent, this will be communicated to the learners, and they will be uncomfortable. To emphasize the point, a trainer must remain very aware of what kinds of behavior and techniques make the group uncomfortable or leave them questioning his own motivations or skills. Every group has its sensitivities. Some might object to unstructured training methods. Others might object to profanity or techniques that bring in politics or religion. The trainer must be aware of these sensitive areas in his selection of techniques because trainees learn more when they are psychologically as well as physically comfortable.

Congruence with Desired Objective

Some techniques are more effective for one type of learning than for another. Here is a sample of techniques appropriate for each area.

Intellectual Knowledge	*Skills*	*Emotions and Attitudes*
Lecture	Role-Play and Psycho drama	Small-group discussions
Reading and Research	Practice sessions	Feedback opportunities
Demonstrations	Negotiation Exercises	"Getting to Know" Exercises
	Simulations	Nonverbal exercises

One of the biggest traps you will find in training is the temptation to select tecnhiques because they seem to convey information, yet this in only useful if the training is in the intellectual area. When working with feelings and emotions, information is of little value. The fact that one knows something does not mean he will change his behavior. Many people know that racism is illogical, yet they still do not change their opinions or behavior. This is equally true for skills. Information is secondary. You can give a person all the information there is about how to ride a bicycle, but he will never be able to ride until he has practiced riding.

It is necessary to make distinction between techniques useful in intellectual learning experiences--lectures, reading assignments, etc., and those like simulations, practice sessions, nonverbal exercises, or feedback that are more adaptable to skills or to changing attitudes.

Artistic Flow

No matter how good a particular technique or method may be, it will lose its effectiveness if repeated too frequently. Part of good training is the ability to combine different techniques so that the overall program has variety and change of pace.

Take ten minutes of lecture, three task-oriented small groups, a report-out, a tabulation, some nondirected whole-group discussion two nonverbal exercises, garnish with recall...*et voila!*

Can you meet all the above criteria in every design? Of course not. This is simply a checklist you can use as a test before you stand up in front of a group. We can assure you that the more of them you are able to meet, the more effective your training will be.

Training Exercises

The following pages contain climate-setting, goal-agreement, and learning activities exercises. In each category they start with the easiest and move to the more complex. The instructions should not be interpreted rigidly but used as a guide. You may add other training exercises you like and can use.

Before attempting to conduct an exercise, be sure you understand the meaning of the terms used to describe these methods.

A lecture in the training session is usually brief and is sometimes called a "lecturette." It is a five to forty-five minute talk by a trainer to identify or explain a theory prior to a structured exercise.

A discussion is a conversation situation in which two or more people make statements and ask questions of one another for the purpose of persuading, clarifying, and informing.

A discussion group brings more than two people together for a pooling of ideas

A task group is assigned a specific task with specific goals. Members are expected to make decisions and take action.

A group is several persons working in a direct face-to-face situation that suggests but does not demand collaboration. Group process refers to the way the group works rather than what is being discussed.

In role playing, an individual spontaneously acts out the part of another individual in a defined situation. It is an action-centered technique providing the group with the common experience of behaviors that can be observed, analyzed, and improved.

Films are good training techniques, and can be used to study decision making, conflicting values, problem solving, leadership, influence and power, and group membership. A film is best used as a support element to a training activity. Participants should be actively involved in viewing. They may cite incidents of behavior, or make predictions rather than view it passively. The trainer should know the film well and explain the purpose for which it is being shown.

TRAINING EXERCISES

CLIMATE SETTING

Title

Getting acquainted

Goal

To facilitate the participation of individuals in a new group.

To share expectations of the training program with other members of the new group.

Time

90 minutes

Handouts

None

Group Size

Unlimited number of trios

TIME	*CONTENT*	*METHOD*
20 minutes	Trainer welcomes group members and asks them to divide into groups of three and introduce themselves.	lecturette
20 minutes	Participants introduce other member of their trios to the full group.	full groups
5 minutes	Trainer explains the goals of the training program and gives overview to full group.	lecturette
20 minutes	Trainer instructs trainees to regroup in original trios and discuss the training program as it has been explained. Participants are instructed to compare their earlier expectations of the training program with what they now know about its structure and purposes.	trios
20 minutes (if needed)	Participants share their expectations of training with other members of the full group. Trainers and participants negotiate on what can be changed.	full group

Process Notes

The welcome should be warm but brief. Tell participants what they need to know before the session starts, but it is not necessary to repeat everything they have already been told by mail or by handout when they arrive.

The trainer should have in mind some way to separate the group into trios. The easiest way is to simply point out trios or start with one person and make up the trios consecutively as the people happen to be seated.

In the introduction in trios, participants should be asked to give not only their names but a little background--where they are from, and the type of work they do. But encourage participants to keep introductions brief when in trios and when back in the full group.

Title

Interest Statements

Goal

To allow participants to become acquainted with one another quickly by hearing the reasons for involving themselves in a student volunteer training program.

To share expectations of the training program.

Time

60-75 minutes

Handouts

Newsprint and markers

Group Size

Six to eight participants

TIME	*CONTENT*	*METHOD*
10-15 minutes	Trainer introduces the rationale for the session by indicating the different concepts of the agendas that people bring to any group situation.	lecturette
10-15 minutes	Trainer asks for check of participants' perceptions and opinions of differing agendas.	question and answer
15 minutes	Participants compare their list of agenda ideas and list on newsprint. These lists are posted on walls.	duos (pairs)
25-30 minutes	Trainees as total group compare expectations and identify common interests in the training program.	total group

Process Notes

This is a climate setting not a goal-agreement exercise. Participants are simply talking about why they are there and what they hope to learn.

This is not only a get acquainted experience for the participant, it it a learning process for the trainer. He can begin to get some idea of whether his own design fits the expectations of the group and how much group consensus exists at this early period.

Posting the lists of expectations on the walls gives each participant an idea of how closely their expectations match. The trainer should assist in identifying common and achievable expectations participants have chosen to display.

Title

Group Conversation

Goals

To develop an open climate and readiness for interaction in a group by sharing the common personal experiences in areas of volunteer work.

Time

30 minutes

Handouts

None

Group Size

Eight is about right. It can be done with fewer or more, but the experience can become more or less intense depending on the group size. Ususlly, the smaller groups are more intense.

TIME	*CONTENT*	*METHOD*
2 minutes	Trainer comments on dynamics that exist when a group of unfamiliar people get together to work. "It will take time for people to work together on a task or feel comfortable enough to share their concerns and ideas with others..."	lecturette
25 minutes	Trainer suggests the participants describe in one or two words their answer to "Right now I feel..." (Example: "Right now I feel excited and anxious.")	participants, including trainer, respond and discuss their feelings.

Process Notes

The length of the exercise depends on the size of the group and its response. The leader must not let this drag on after the group loses interest.

Suggest that participants use just one or two words to express the way they feel. Note that the trainer, too, tells how he feels. He should be honest about it.

TRAINING EXERCISES

GOAL AGREEMENT

Title

Stating Your Expectations and Goals

Goals

To develop a broader view of the group's goals.

To share one's own goals with other members of the group.

Time

60 minutes

Handouts

None

Group Size

8 - 12. Can be fewer or more participants. Size of group will affect the length of the exercise.

TIME	*CONTENT*	*METHOD*
10 minutes	Trainer gives overview of the workshop or conference and asks members of group to take several minutes to reflect on the expectations and goals they had for the workshop before they arrived.	lecturette
	Then the trainer asks the participants to divide into pairs and compare their goals with one another.	
30 minutes	A participant volunteers to list to list the individual goals on newsprint that participants have shared with the group or recorded on their own sheets of paper.	group discussion
10 minutes	Total group analyzes goal sheet (on newsprint) and sets priorities.	total group
	Trainer discusses which goals fall within the parameters of the workshop and which goals are not planned for inclusion. Total group agrees on the list of goals for the workshop.	

Process Notes

This technique for goal setting permits the freest expression by participants. They express their goals before the trainer has shown his. The trainer must be skillful in rejecting goals that do not belong on the list.

In some instances it may take more than 10 minutes to reach a consensus on goals.

As agreement is reached, accepted goals are listed on another sheet of newsprint.

Title

Goal Sharing

Goal

To share and agree upon goals for the training program.

Time

60 minutes

Handouts

A partial list of the major goals for the workshop as prepared by the trainer.

Group Size

8 - 12. Can be fewer or more participants. Size will affect the time required.

TIME	*CONTENT*	*METHOD*
15 minutes	Trainer distributes general goals sheet which lists some of the major goals for the workshop. Trainer reviews the list with participants and suggests to them that they develop additional goals that they feel are appropriate for the workshop.	lecturette
45 minutes	Participants share their goal suggestions with the total group. The goals are recorded on newsprint and a priority agreed to. A check is made to determine the participants' satisfaction with the final list.	full group discussion

Process Notes

In this goal-setting technique, the trainer starts by sharing the goals he has already prepared. He makes it clear that this is incomplete and it is up to the participants to add or subtract

The trainer must be careful not to appear to be imposing his own list on the group, but he must also be ready to show why some of those added by participants are impossible or outside the parameters of this training.

Title

Goal and Schedule Agreement

Goal

To share goals expectations with other participants and to reach agreement on the goals.

Time

60 minutes

Handouts

Training schedule and partial list of goals

Group Size

8 - 12. More or less if necessary.

TIME	*CONTENT*	*METHOD*
10 minutes	Trainer presents the training schedule including list of goals to participants and directs them to divide into pairs to discuss it.	lecturette
15 minutes	Pairs discuss what goals could be reached as a result of their participation in training. Also, they make observations on areas where the training design does not meet their needs.	pairs
35 minutes	Total group sharing of the observations made in the pairings. Total group revises goals and schedule according to their conclusions. As agreement is reached, items are listed on newsprint.	full group discussion

Process Notes

This technique permits not only discussion of goals but of the whole training schedule. An inexperienced trainer may find his whole design revised or replaced. Experienced trainers seldom have too much difficulty because they are flexible.

Note that the basic discussion of goals and schedule is by pairs. When the group reassembles, get suggestions from each pair, moving along from one to another. Do not let one pair dominate the session.

TRAINING EXERCISES

LEARNING ACTIVITIES

Title

Agenda Building

Goal

To build an agenda.

Time

20 to 30 minutes

Handouts

None

Group Size

6 to 12

TIME	*CONTENT*	*METHOD*
5 minutes	Trainer emphasizes the importance of the participants clearly recognizing the subject (agenda building) and the goal (understanding the agenda building process).	lecturette
10 minutes	Trainer asks participants as a group or in smaller teams to brainstorm a list of activities that are important for developing an agenda for a meeting.	
10-15 minutes	The total group gives a sequence to the activities, discusses the implications of neglecting any of the steps, and identifies ways to combine steps for efficiency.	group discussion

Process Notes

This technique is basic participative training. The leader states the subject and goal. Small teams bring out ideas. The group reaches a consensus.

Title

Sharing resources

Goal

To provide for a sharing of information about resources among participants.

Time

45 minutes

Handouts

Name tags if needed

Group Size

4 or more

TIME	*CONTENT*	*METHOD*
5 minutes	Trainer indicates his awareness of the many types of resources present at the workshop. The trainer might ask that some criteria for sharing resource information be established.	lecturette
20 minutes	The trainer asks the group to divide into pairs, make introductions, and share resource information.	pairs
20 minutes	Trainer has pairs form into quartets to share resource information. One member of the quartet records resource information next to person's name on newsprint. Information is hung on walls.	quartets
	Trainer reconvenes total group and asks them to study resource sheets. There is no formal closure to this session. The participants are to spend as much time as they wish visiting with one another and reviewing posted resource lists.	total group

Process Notes

The objective here is to let every participant find out who knows what or can do what in the group. The most important task of the trainer is to make sure everyone understands what is meant by "resources" and that in recording resources, the criteria are observed.

Title

Not Listening

Goal

To allow participants to experience the frustration of not being heard and not listening.

Time

60 minutes

Group Size

Any number of pairs

TIME	*CONTENT*	*METHOD*
5 minutes	Trainer introduces the session by commenting on the fact that most of our communication problems stem from not listening to what others are saying.	lecturette
10 minutes	Trainer divides group into pairs and distributes role plays to each pair. (See next page.) This role play demonstrates the frustration of not being heard.	
	Participants are given time to get into their roles.	reading role plays alone
15 minutes	When participants appear ready, the trainer starts the role plays and continues them until it appears that there is a high level of discord.	role plays
30 minutes	Trainer leads discussion on the frustration of not being heard. Responses to the exercise are listed on newsprint.	group discussion

Process Notes

There must be enough space to permit pairs to role play without interference. The trainer moves from pair to pair and observes and listens. If any pair seems to be reaching an agreement, the trainer reminds them of their roles.

ROLE PLAY

CLIENT'S ROLE

You have retired from your job and moved into the city. The situation is that you are experiencing various problems; one is that poor investments have affected your financial security. To make matters worse, your wife is seriously ill and your youngest child is in her last year of college. You have called a church for consultation, but the only suggestion you were given was that you contact your local program for the aging and/or the Department of Social Services.

You are about to talk to a staff member to get help. You *must* make him understand the seriousness of your situation. You are quite upset, and therefore feel that you have no time to waste in small talk. You feel that the staff member's sole concern should be to give you the help you need *immediately*.

ROLE PLAY

STAFF WORKER ROLE

INSTRUCTIONS:

You have been a volunteer staff worker for two months at the Center. You have come to realize that one of the biggest problems you face while performing your job is that most of the people you try to help have preset notions about what you should do for them.

It has become increasingly obvious to you that the main solution to this problem is to tell the people what the services are that the Center offers. You feel very strongly that if the client only knew what was actually available for him, he would be in a much better position to be helped.

Furthermore, you resent a little those clients who make demands on you rather than listening to what you have to say. After all, you do know what you're talking about.

You therefore have decided that within the first few minutes of any interview, you will make sure that each client knows (1) exactly what the various services of the neighborhood center are, and (2) how these services can be used.

Title

Brainstorming and Processing of Ideas

Goals

To generate ideas or solutions to a problem by listing them and not evaluating them.

Time

60 to 105 minutes

Handouts

None

Group Size

6-10

TIME	*CONTENT*	*METHOD*
5 minutes	Trainer discusses the problem solving process. The group is directed to select a secretary. The group forms a circle with their chairs and the secretary is directed to record every idea on newsprint. The ground rules are read to the group. They are: there is to be no criticism or evaluation during the brainstorming phase; far out ideas are encouraged as are practical ones; quantity is desired. The trainer reads a problem. The problem can be any one that is relevant to the program. For example, "In what ways can we get more money for our program."	lecturette
15 minutes	The group has 15 minutes to generate ideas.	group brainstorms and lists ideas
20 minutes	The secretary calls time after 15 minutes and notifies the group that the ban on criticism is over and asks them to evaluate their ideas and select their best one.	

TIME	*CONTENT*	*METHOD*
20 minutes	If there is more than one group, the trainer asks the two groups to form one group, share ideas and form a single list. The participants are asked to build together ideas that might be used in combination. The secretaries act as spokesmen for the groups.	groups of 6 form group of 12
30 minutes	The trainer writes the final list on newsprint and asks the total group to rank them in order.	record on newsprint
	Following the rank ordering of ideas, the total group discusses and evaluates the brainstorming and problem-solving techniques used in the session.	group prioritizes list

Process Notes

The trainer's job is primarily that of restraining criticism or evaluation during the brainstorming session. That is the time to let ideas out, not comment on them.

EVALUATION

Evaluation is important for everyone involved--for the trainer, the learners, and the sponsors. They all want to know what has been accomplished in a training program. Yet, evaluation is most popular when it is applied to someone else. That's because it is generally negative, it is often personally focused, and it tends to be judgmental. All too often evaluations concentrate on failures rather than accomplishments.

Recognizing these difficulties, we can try to eliminate them, so far as possible, in evaluation of our training activities. We will try to use evaluation simply as another learning tool, a tool that can be dangerous and must be handled with care but a tool that is nonetheless useful.

Trainers separate evaluations into two major categories:

1. Evaluation of the achievements of learning events (training evaluation).
2. Evaluation of the impact of the learning event on the learner and others over a period of time (impact evaluation).

Evaluating the Learning Event

There are four reasons to evaluate training. They are:

1. Determine the extent to which the Definitive Learning Objectives have been accomplished during the training. If the DLO's of the training design are good ones, this type of evaluation is easy.

Let's go back to the beginning where we agreed to some DLO's for training. One DLO was:

> At the end of training, volunteers will be able to list nine of the ten most important social service agencies in the area.

So we have reached the time for evaluation. We have an easily measured objective. Can the learners list nine of the ten agencies? Ask each one to make a list and see. That's all there is to this evaluation. Naturally all the DLO's are subject to evaluation, and some are more difficult. For example, if one objective is to have volunteers demonstrate skill in counseling a high-school dropout, this cannot be done by making a list.

You will have to set up some sort of role-plays or simulation that you can observe and evaluate.

In every instance, the evaluation is based on a demonstration of accomplishment of the Definitive Learning Objectives.

2. Determining whether the learner can correlate what he has learned with his own job situation is the next step in training evaluation. This is more difficult, even though you are only evaluating the learner's immediate, here and now, ability to transfer what he has learned from a training environment to a work environment.

This can be done by asking the learner to make the transition by asking him questions such as:

--List three ways to use what you have learned here when doing your volunteer work.

--Describe your volunteer activity and list two ways this training has made it easier.

--Think of all the things you do on your volunteer job and list two ways this training has made it possible for you to do them better.

These questions are open-ended. They require an essay type response (oral or written), which requires some degree of judgmental evaluation by the trainer.

Be careful in phrasing these questions. Do not probe into the learner's feelings about training. Here you are only interested in the ability of the learner to make the transition from a learning experience to an actual situation.

3. Feelings of the learner are the next step in evaluation. Experienced trainers seldom need any formal evaluation of feelings. Positive and negative feelings of the group or part of the group come through clear and loud during the training sessions. And they are not consistent. There will be times when no one is happy. Fortunately the reverse is also true. You are interested in the overall level of feeling with the hope that it ends high.

There are, of course, some testing tools for evaluating feelings.

--Rate your level of satisfaction with the group. If it is low, circle number 1. If it is high, circle 5.

1 2 3 4 5

--Which word best describes your reaction to this group:

Positive Indifferent Negative

4. Finally, how does the group evaluate the trainer's performance? Now you are asking the learners to evaluate you. The purpose is to help you learn.

How do you get this feedback? Once again, orally or in writing, ask questions like:

--What part of the content was most impressive to you? The least impressive?

--How would you reorganize the training if you believe it's necessary to do so?

--What specific mannerisms, behaviors, and methods of presentation are the trainer's greatest strengths?

--To what extent did the pace of the training meet your needs? Does the presentation seem coherent? If not, what would you do to make it so?

--What's your most positive impression of the trainer in terms of behavior? What's your least positive impression?

Impact Evaluation

Up to this point we have been talking about evalution of the training event. This type of evaluation is done during or at the end of training. It should show the change in knowledge, skill, or feelings brought about by the training as measured at the time the evaluation is made.

This is as far as most trainers go with evaluation, and many feel it is as far as they should go.

There is, however, a second type of evaluation, impact evaluation. This attempts to evaluate the effects of learning at some later date and involves not only the learners but the communities with whom they have worked.

Impact evaluation attempts to determine the effects of the training six months or a year later. Does the learner still know and use the agencies for referral? In addition, what about the clients? What good have they received as a result of what was learned in the training program?

To go even further, what about four years later? The volunteer is out of school. What was the impact of the training on this learner in making him a better human being or a more effective member of society?

This sounds difficult--and it is.

Impact evaluation can go on forever. "For want of a nail, a shoe was lost . . ." It is expensive and time consuming, and it demands the application of many technical disciplines and special tools like mathematical models and computers.

However, it is possible to collect some data related to impact evaluation and, by making assumptions and applying judgment, arrive at reasonable if unverifiable conclusions.

If you want to, you might try a simple impact evaluation effort. But do not expect to reach any great conclusions based on results. There are too many outside factors involved.

Send out a questionnaire three, six and nine months after training. Ask questions like:

--List specific instances in which training provided by_____ at_____University benefitted you in your volunteer work.

--If you have been unable to apply the training to your volunteer activities, list three or four reasons why.

--List volunteer job procedures hou have consciously altered as a direct result of your training.

--Note what skills you now use (if any) which were developed by your training.

--Describe your present attitude about the value of the training.

--What didn't you learn that you found you needed?

Evaluation for Others

We have assumed that evaluation, whether training evaluation or impact evaluation, if for the benefit of the learner or the trainer. This is not always true. Evaluation may be required by the university administration or by the agency or foundation financing the volunteer program or the training. Someone is paying, and that someone usually wants to know what he is getting for his money.

From what has been said about evaluation, it should not be difficult for you as a trainer to prepare an evaluation report on the training itself. Simply state the Definitive Learning Objectives and then state the extent to which they were achieved. Try to avoid any obligation to prepare an impact evaluation report.